Federal Acquisition Service

CPRM Industry Partner Meeting

May 31, 2016

Agenda

➤ Purpose of the CPRM Industry Partner Meeting

➤ Next CPRM Release, Jun 10, 2016:

- Added Issuing Agency / Issuing Bureau to Order Data form
- Updated logic for data pushed from ITSS to CPRM
- Updated Logic for Active Flag
- New Agency CAF Rate Rule

➤ Updated Training Modules

➤ Questions / Answers

Purpose of CPRM Industry Partner Meeting

➢ A method to share the following:
  - Overview of next release of enhancements
  - Feedback on capabilities/requirements/future enhancements being considered
  - Opportunity to share Industry Partner comments or recommendations
  - Opportunity to discuss issues with the CPRM from the Industry Partner point of view

➢ Attendees
  - Voluntary

➢ Frequency
  - Quarterly

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June 10, 2016 Release Summary

➢ Enhancements:

- CHG90930 – Added Issuing Agency / Issuing Bureau to Order Data form
- CHG92647 – Updated Logic for data pushed from ITSS to CPRM
- CHG94304 – Updated Logic for Active Flag
- CHG94305 – New Agency CAF Rate Rule

➢ Defect Corrections

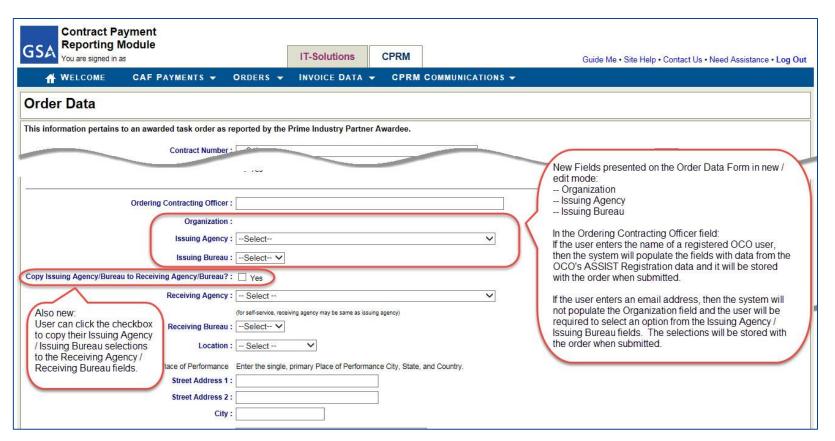- CHG94985 – Correct 'Invalid Order' message on CAF Payment Data form

CHG90930 - Added Issuing Agency / Issuing Bureau to Order Data form

➢ The purpose of this change is to enable the Issuing Agency and Issuing Bureau to be identified for each order

➢ We added the following:

- New fields on the Order Data form:
  - Organization – only utilized when the Ordering Contracting Officer name is found in the list of existing OCOs.
  - Issuing Agency – required field
  - Issuing Bureau – required field
  - Copy Issuing Agency/Bureau to Receiving Agency/Bureau
- Soft validation message if the system detects that the Issuing Agency / Bureau has changed
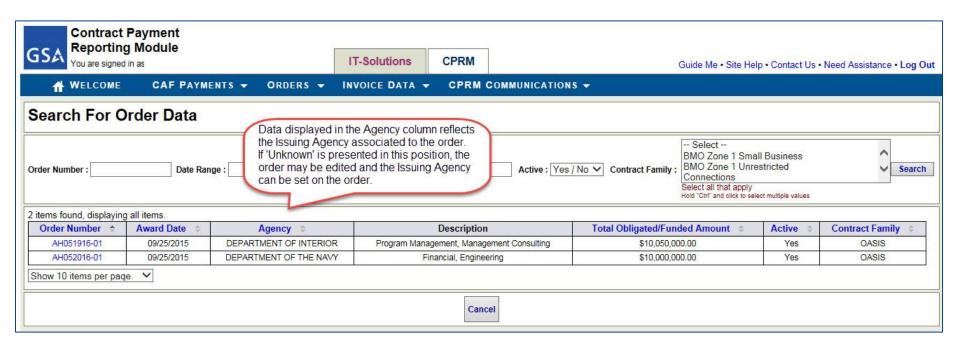
CHG90930 - Added Issuing Agency / Issuing Bureau to Order Data form

CHG90930 - Added Issuing Agency / Issuing Bureau to Order Data form

CHG92647 – Update Assisted Services Trigger (slide 1 of 2)

➢ The purpose of this change is to maximize the data populated in CPRM from award data in ITSS

➢ Additional fields will populate in CPRM when an order is awarded in ITSS, as follows:

- ▪ Estimated Ultimate Completion Date – populated with the POP End Date. When a mod is awarded, if the existing Estimated Ultimate Completion Date is earlier than the new POP End Date, then the Estimated Ultimate Completion date will be updated to the new POP End Date.

- ▪ Functional Area – if the contract is associated to a single functional area, then the order will be populated with that functional area.

CHG92647 – Update Assisted Services Trigger (slide 2 of 2)

➢ Additional Fields, continued…

- Number of Bids – populated from ITSS

- Predominant Contract Type – populated from ITSS

- Predominant Order NAICS Code field – if the contract is associated to a single functional area, and if that functional area is associated to a single NAICS code, then the order will be populated with that NAICS code.

- Sourcing / Method of Award – If the solicitation is conducted in ITSS or e-Buy, then the Sourcing / Method of Award field will be populated with 'ITSS' or 'e-Buy', respectively. Otherwise, the field will be populated with 'Other'.

- Total Estimated Value – populated with the Total Funded Amount. Existing functionality is unchanged for mod awards.

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CHG94304 – Update Active Flag Logic

➢ The purpose of this change is to improve the accuracy of the Active Order setting.

➢ A nightly job runs to update the Active setting in CPRM.

➢ The nightly job was updated to set the Active Flag to 'Y' if the current date is within the order's Period of Performance.

➢ Note: the nightly job already functioned to set the Active Flag to 'N' when the current date is not within the order's Period of Performance.

CHG94305 - New Agency CAF Rate Rule

➢ The purpose this change is to enable the GSA to define CAF Rate rules for a particular contract family and agency pair.

➢ The system will match the new Agency CAF Rate rule to orders where there is a match on:

- Contract Family
- Agency (can be set to match on Issuing Agency and/or Receiving Agency)
- Rule Date Range and Order Period of Performance

Contract Payment Reporting Module

GSA

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🏠 WELCOME   CAF PAYMENTS ▾   ORDERS ▾   INVOICE DATA ▾   CPRM MANAGEMENT ▾

Order Data

This information pertains to an awarded task order as reported by the Prime Industry Partner Awardee.

Contract Number : GS00Q09BGD00
Contract Family : FAS Alliant GWAC

Period of Performance : 10/01/2015 - 09/30/2016
Estimated Ultimate Completion Date : 09/30/2016
Active : Yes
Initial Award Date : 09/25/2015
Initial Obligated/Funded Amount : $50,000,000.00
Total Obligated/Funded Amount : $50,000,000.00
Total Estimated Value : $50,000,000.00
Invoice Data Amount : $491,566.60
Closed Out : No
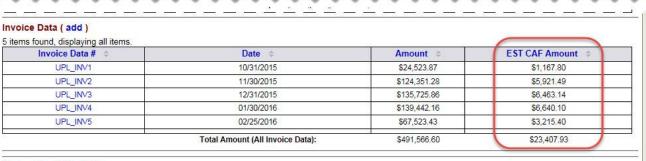
Ordering Contracting Officer : uat.example@agency.gov
Organization :
Issuing Agency : DEPARTMENT OF EDUCATION
Issuing Bureau : INSTITUTE OF EDUCATION SCIENCES
Receiving Agency : DEPARTMENT OF EDUCATION
Receiving Bureau : FEDERAL STUDENT AID
Location: Nationwide

> Example: There is an Agency CAF Rate rule with the following attributes:
> • Contract Family = FAS Alliant GWAC
> • Agency = Department of Education (for issuing agency)
> • Date Range: 01/01/2015 – 12/31/2016

Invoice Data (add)

5 items found, displaying all items.

Invoice Data #	Date	Amount	EST CAF Amount
UPL_INV1	10/31/2015	$24,523.87	$1,167.80
UPL_INV2	11/30/2015	$124,351.28	$5,921.49
UPL_INV3	12/31/2015	$135,725.86	$6,463.14
UPL_INV4	01/30/2016	$139,442.16	$6,640.10
UPL_INV5	02/25/2016	$67,523.43	$3,215.40
Total Amount (All Invoice Data):		$491,566.60	$23,407.93

Supporting Order Data

Date Created	Created By
05/23/2016	

CAF Payment Data

One item found.

Applicable Rule Type	Rule Scope	Rate	Max Pmt	Date Range
Agency	DEPARTMENT OF EDUCATION	5.00%	Unlimited	10/01/2015 - 09/30/2016

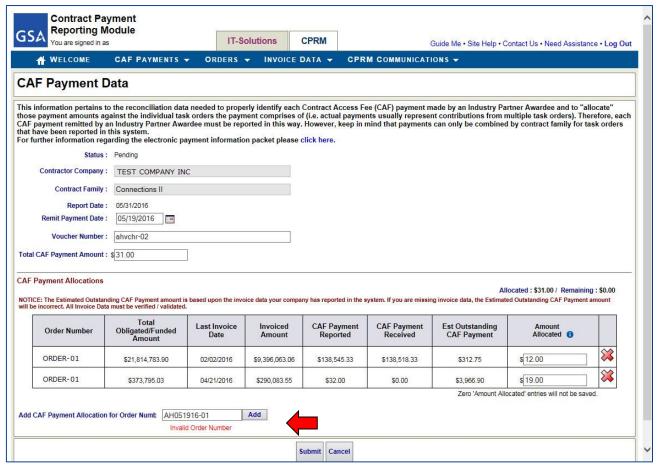| Voucher Number	Remit Date	Payment Amount	Status
No CAF Payments Found.			
Total Amount (All Payments, Excluding Rejected Payments):		$0.00	

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CHG94985 – Correct 'Invalid Order' message on CAF Payment Data form

➢ The issue: when a contractor user attempts to edit an existing, pending CAF Payment Data form by adding a new order to the CAF Payment Allocations table, the system presents the 'Invalid Order Number' error message. This message is presented even when the order is a valid order to add to the form.

➢ The correction: the system will no longer present the Invalid Order Number message when valid orders are added to the form.

  ▪ Valid orders:

    • The order must be for the same contractor company and contract family as stated on the CAF Payment Data form.

    • The order must have invoice data submitted for the order.

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CHG94985 – Correct 'Invalid Order' message on CAF Payment Data form
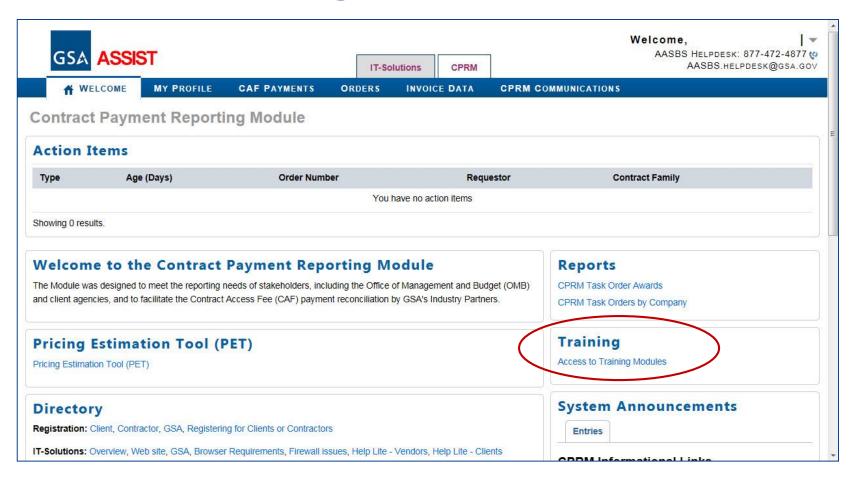
OTHER TOPICS

Updated Training Materials

Federal Acquisition Service
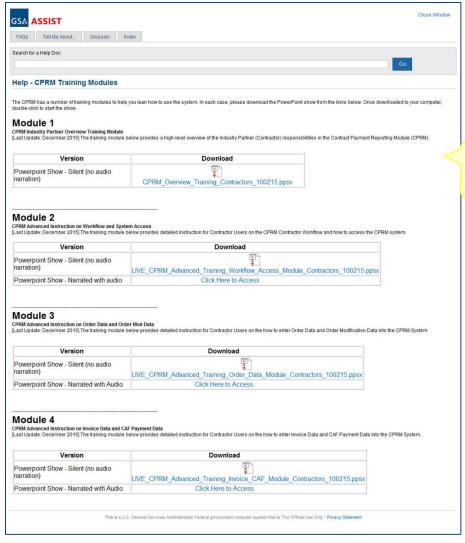
Updated Training Materials

All Modules were updated in March 2016 and will be updated again for the May 2016 Release

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Open Discussion

- ➢ Comments
- ➢ Feedback
- ➢ Questions